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AUTHOR Frank, Edward; And Others
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ABSTRACT

Designed to assist in the preparation of high school students for entry-level positions in wholesale distribution, this module focuses on the following eight subject areas: orientation to wholesaling, careers, wholesale buying, receiving and materials handling, warehousing, wholesale selling, assembling and shipping, and finance and credit. Each subject area is presented in a separate section which includes performance objectives and corresponding content, and suggested activities. A bibliography of related resources, a case problem in human relations in wholesaling, a form for rating human relations skills, and a sales representative rating sheet are appended. (SH)

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WHOLESALE DISTRIBUTION MODULE

An Advanced-Level Option for
Distribution and Marketing

For The U.S.O.E. Occupational Clusters of
04.12 Industrial and Institutional Marketing
04.19 Transportation and Travel Marketing
04.22 General Marketing

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The University of The State of New York
The State Education Department
Bureau of Occupational Education Curriculum Development
Albany, New York 12234

1977

CE 014 876

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FOREWORD

Wholesale Distribution is another module in the series being developed as advanced options in a secondary education marketing and distribution sequence or as continuing education offerings. Persons interested in learning about the wholesale distribution occupational cluster or those desiring to improve their skills and knowledge will benefit from studying the principles and practices provided in this module.

In 1974, *The Distribution and Marketing Syllabus* was presented as a foundation course to be taught primarily in grade 11. It identified 14 marketing functions and correlated them with the 17 recognized occupational clusters. Later that same year, a State curriculum advisory committee was convened. The members were:

J. Frank Birdsell, Jr., Chairman of the Board of the American Hotel-Motel Association
Owen Brandt, New York City Schools
Michael Campbell, Northport (L.I.) High School
Paul L. Courtney, Executive Vice President, National Association of Wholesalers-Distribution
Edward Frank, West Seneca High School
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Robert Kross, Centereach (L.I.) High School
Walter B. Lotz, Sr., Vice President for Sales, Tobin Packing Co.
John Southerland, Vice President, The Woodward Company, Albany
Ellen Stegman, A travel agent and instructor, formerly with ASTA and now with GIANTS of New York City

The State Education Department was represented by Douglas T. Adamson, then Chief, and John Brophy, William Plimley, and Marian Potter, Associates in the Bureau of Distributive Education, as well as Alvin E. Rubin, Associate, Bureau of Occupational Education Curriculum Development.

Wholesale Distribution was one of the three modules recommended by the above committee for development. *Advertising Services* was printed and distributed in 1976, and *Travel and Tourism* was released in 1977.

The content of this module is designed to assist in the preparation of high school students for entry-level positions in wholesale distribution. Student performance objectives, which are correlated horizontally with the related content topics and suggested activities, are specific enough to be used in evaluating individual progress.

This module was written by Edward Frank, William Gearhardt, Gary Spaid of Rush-Henrietta Central Schools and Harmon Sweet of James E. Sperry High School. Marian Potter augmented several sections, prepared the introductory pages, and worked closely with Alvin Rubin, who managed this curriculum development project and prepared this module for publication.

The Department is interested in the effectiveness of this module and in the results of its implementation in the classroom. Comments, reactions, and suggestions for improvement will be welcomed by G. Earl Hay, Chief Bureau of Occupational Education Curriculum Development. Questions and requests for assistance regarding content, instruction, and evaluation should be addressed to Chief, Bureau of Distributive Education.

The Bureau of Occupational Education Curriculum Development

and

The Bureau of Distributive Education

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Photographs courtesy of:

Fay's Drug Company, Liverpool, N.Y. 13088
Monarch Marking Systems, Pitney Bowes, Dayton, Ohio 45401
The Dey Handling Systems, Inc., Hackensack, N.J. 07601

Coding and ticketing are integral functions of wholesale distribution

INTRODUCTION

While distribution is a "behind the scenes" activity, it is of primary importance in profitable wholesale and retail business operations. Handling of goods is taken for granted without considering the many skills necessary for competent traffic and stock management, well-managed merchandise processing, transportation of merchandise and maintenance of records.

EMPLOYMENT DEMANDS

The number of persons employed in the wholesale distribution of goods has more than doubled in the last 25 years, and over five million will be employed by 1980. In just two areas, the anticipated job openings until 1985 will require 330,000 wholesale trade salesworkers and 225,500 shipping and receiving clerks. While job characteristics are expected to change due to more complex systems designs, advances in computer technology, and the sophistication of materials handling, the demand for employees will be steady.

High school students can be prepared for entry-level jobs in wholesaling, warehousing, and transportation. Adult continuing education programs may be offered to current retail and wholesale employees, and to persons seeking new or part-time employment.

ADMINISTRATION CONSIDERATIONS

Wholesale Distribution has been developed for the 12th grade competency cluster phase with the performance objectives being realized in 10 to 20 weeks.

Students interested in a Distributive Education major sequence should take the first year course, Distribution and Marketing. The sections on Buying Merchandise, Personal Selling and Recordkeeping provide a foundation for this more comprehensive study of the wholesaling, warehousing, and transportation of goods.

This module may be scheduled for a single period during a semester for up to one-half unit of credit in a vocational or three-unit sequence. A period in a classroom-laboratory, school store, or simulated warehouse is particularly advantageous for a higher level of competency if students are preparing for direct entry into this field of employment. In addition, cooperative work experience is particularly recommended in a distribution center or freight forwarding operation.

The Wholesaling Distribution module includes portions of several occupational clusters, U.S.O.E. 04.12, Industrial and Institutional Marketing; 04.19, Transportation and Travel Marketing; and 04.22, General Marketing. It may also be utilized with the Credit and Collections Module, the Typewriting Syllabus and the Bookkeeping/Accounting 1 and 2 Syllabus for broader occupational preparation.

FACILITIES

A separate classroom is not essential for effective instruction in Wholesale Distribution, but simulated activities in wholesaling, warehousing, and transportation will contribute to a more realistic learning situation.

STUDENT ATTRIBUTES

Working in wholesaling involves working with people, while materials handling in warehousing is more concerned with equipment and merchandise. Transportation workers "inside" must have a flair for figures and an interest in detailed records. Those "outside" require a certain amount of physical stamina coupled with the ability to meet and get along with people. The field is broad and involves a wide range of both mental and physical abilities.

COURSE FORMAT

Each module has 3 parts:

1. Performance objectives are listed on the left page. These are specific, measurable goals which the student is expected to attain upon completion of the module.

2. Content topics on the same page are divided into sub-topics as needed.

3. Teaching suggestions on the right page are correlated horizontally with the performance objectives and content topics. These contain teaching methods and activities for the learner.

Sample projects, case problems, manuals, resources, and references are included in the appendix.

TEACHING SUGGESTIONS

The following points are offered as a means of improving instruction.

- Review each unit well in advance of the class and obtain the instructional materials needed for an effective presentation.

- Use a variety of learning experiences in order to challenge the different levels of student abilities.

- Take all opportunities to provide for individual or small group instruction.

- Keep the instruction flexible enough to permit each student to gain the skills and knowledges required to achieve his or her specific goals.

- Use instructional aids to clarify the presentations.

- Read trade magazines to keep up to date with new information and developments that are occurring in the field of wholesale distribution.

EXPECTED OUTCOMES

This module is intended to prepare persons for employment in traffic departments, warehouses, distribution centers or in buying or selling at the wholesale level. Students planning to operate their own businesses would find this "behind the scenes" aspect of marketing useful.

A variety of job options are available and this module in Wholesale Distribution presents an opportunity to become familiar with the various career alternatives.

A cooperative education student learning on the job

WHOLESALE DISTRIBUTION MODULE

I. ORIENTATION

Performance Objectives	Content
The student will be able to:	
. Contrast 5 wholesaling functions, using complete sentences.	A. Wholesaling Functions 1. Buying 2. Finance and Risk Bearing 3. Receiving 4. Materials Handling a. Bulk breaking b. Standardizing c. Grading d. Storing e. Retrieval f. Inventory control 5. Communications a. Coding b. Data processing c. Reporting d. Billing e. Tracing f. Correspondence g. Recordkeeping 6. Warehousing 7. Selling 8. Assembling 9. Shipping 10. Management
. Name 3 types of wholesalers and 2 services each provides.	B. Types of Wholesalers 1. Merchant Wholesalers 2. Manufacturer's Branch Offices 3. Agents and Brokers a. Commission merchant b. Manufacturer's representative c. Auctioneer d. Broker 4. Specialists a. Drop shipper b. Rack jobber c. Assembler

WHOLESALE DISTRIBUTION MODULE

I. ORIENTATION

Suggested Activities

A. Show a movie on wholesaling, marketing, or channels of distribution. See the resource listing in the appendix at the end of this module.

Have each student select a local or regional distributor of foods, paper products, or other commodities and describe all of the wholesaling functions performed by that distributor.

Obtain some sample voided forms and printouts from a local warehouse, distribution center, freight forwarder, or receiving department for the students to review and analyze content.

B. Several interested students could go through the yellow pages or classified section of the local or out-of-town telephone directories to find examples of each type of wholesale operation.

A local wholesaler who operates a warehouse should be willing to show the class how his plant is operated.

Wholesalers may be compared or contrasted as to:

- The kinds of merchandise bought and sold
- The structure of their sales organization
- The amount of capital investment necessary
- The volume of business handled
- The types of storage needed
- The kind of transportation used

WHOLESALE DISTRIBUTION MODULE

I. ORIENTATION

Performance Objectives	Content
The student will be able to:	
. Describe the physical distribution process.	C. Physical Distribution 1. Transportation 2. Warehousing 3. Merchandise Handling
. Explain 5 ways the wholesaler assists the retailer.	D. Customer Services Offered 1. Delivery 2. Merchandising Aids 3. Financing Retail Purchases 4. Cooperative Advertising 5. Sample Rooms and Displays 6. Demonstrations 7. Technical Assistance
. Describe 3 different approaches to distribution which affect the area covered.	E. Factors Affecting the Scope of Distribution 1. Intensive 2. Selective 3. Exclusive 4. Integrated
. Show 3 ways the wholesaler adds value or utility to the goods passing through.	F. Utility or Value Added to Goods 1. Time 2. Place 3. Form 4. Integrated
. Describe 5 steps in a merchandising strategy.	G. Wholesale Merchandising Strategy 1. Marketing Research 2. Product Planning 3. Buying 4. Pricing 5. Customer Services 6. Promotion

C. Trade publications and visits to the sites are some of the sources for research on the equipment used in handling merchandise in loading, unloading, stacking, retrieval, etc.

Some students could develop a list of entry-level jobs available as operators of merchandise handling equipment and as recordkeepers.

D. Some local wholesalers may be interested in leading a panel discussion about the services provided to retailers. Inclusion of some retailers on the panel may provide additional stimulus.

E. Discuss the similarities and differences in the distribution process for such products as automobiles, bread, men's shirts, office equipment, golf clubs, and jewelry.

F. Certain students with the ability and interest could write reports on the economics of utility added to goods by warehousing.

G. The class may develop a merchandising strategy for a selected product. Students could select and be responsible for areas such as marketing research, pricing, customer services, promotion, and layout.

WHOLESALE DISTRIBUTION MODULE

I. ORIENTATION

Performance Objectives	Content
The student will be able to:	
. Explain 3 functions of a warehouse.	H. Important Functions of a Warehouse 1. Internal Layout 2. Receiving Procedures 3. Shipping Procedures 4. Traffic and Transportation
. Describe 3 kinds of wholesaler's customers.	I. The Wholesaler's Customers 1. Industrial Firms - 41% 2. Retailers - 34% 3. Other Wholesalers - 19% 4. The Export Market - 5% 5. Direct to Consumers - 1%
	J. Trends and Statistics 1. Annual Sales Volume 2. Employment 3. Percentages 4. Comparisons
. Give 3 examples of government regulation of the wholesale distribution industry.	K. Regulation of the Industry 1. Interstate Commerce Commission 2. Federal Trade Commission 3. Import and Tariff Laws 4. Bonding and Licensing

Suggested Activities

H. Some students may be able to obtain blueprints or charts of functional warehouse layouts. Others with artistic ability may wish to draw or to copy such a layout.

I. Through a visit or via the telephone, surveys may be made to determine the kinds of products handled by the various wholesalers in the community.

J. This is a topic where the class can have a practical lesson in constructing bar graphs, line graphs, pie graphs, frequency polygraphs, and histograms.

K. These laws, regulations, and regulatory agencies may be studied in more detail with the assistance of local librarians and attorneys. The students could follow through with short reports on selected regulations and their effects upon the wholesale distribution industry.

WHOLESALE DISTRIBUTION MODULE

II. CAREERS

Performance Objectives	Content
The student will be able to:	
. Describe 3 duties and responsibilities of 5 positions available in the field of Wholesale Distribution.	A. Obtaining the Job 1. Positions in Wholesale Distribution* a. Purchasing agent b. Marketing research analyst c. Sales-service supervisor d. Territory salesperson e. Sales engineer f. Credit manager g. Route dispatcher h. Route salesperson i. Receiving clerk j. Shipping clerk k. Traffic agent l. Traffic manager m. Warehouse manager n. Credit clerk o. Credit collector p. Materials handler q. Weigher r. Freight rate clerk s. Interline clerk t. Tracer clerk u. Over/short-damage clerk v. Order picker w. Stock clerk x. Counter clerk y. Billing clerk
. Prepare a personal resume.	2. Preparing a Resume a. Essential items b. Correct data c. Activities and interests d. Brevity vs. completeness e. Legibility and appearance
	3. Sources of Assistance in Locating Available Positions a. Classified advertisements b. Guidance counselor c. DE teacher-coordinator d. State employment service e. Private employment agencies f. Personnel offices g. Friends and acquaintances

* Not all inclusive

WHOLESALE DISTRIBUTION MODULE

II. CAREERS

Suggested Activities

A. Take the class through an analysis of an occupational cluster related to wholesale distribution. Investigate aspects such as:

- Available entry-level jobs
- Entry-level skills required
- Duties and responsibilities of the entry-level jobs
- Starting pay and wage and salary schedule
- Fringe benefits
- Working conditions
- Advancement and career opportunities
- Inservice training or education possibilities

Have each student select a possible wholesale distribution career and start a career manual according to the instructions for a DECA project. Preparation of the career manuals should be a continuing project through this module. Reports to the class can be made at various stages; and the completed manuals may be evaluated toward credit for the course. (See the appendix for "A Career Manual for Transportation (04.19) or Wholesaling (04.22).

It would be an interesting exercise to have the class construct an organizational chart for a wholesale distribution business. Try to include as many of the positions studied; and rank the positions in a hierarchy. If possible, a line/staff interrelationship of duties and responsibilities may be charted.

Review the importance of various sections of the resume and show how emphasis may change depending upon the job being sought.

Contrast the options available in locating a job.

Ask the students to scan the want ads for jobs relating to wholesale distribution.

Encourage the students to read related trade publications to locate regional and national job opportunities.

Invite a guest speaker such as a representative of an employment agency or the N.Y State Employment Service to discuss the services available.

II. CAREERS

Performance Objectives	Content
The student will be able to:	
. Write a mailable letter of application.	4. Writing an Application Letter
. Correctly complete an employment application form.	5. Completing an Employment Application Form
. Conduct himself or herself properly during an interview.	6. Employment Interview
. Write a satisfactory followup letter after the simulated job interview.	7. Post-interview
. Describe 5 mental and physical qualifications for working in Wholesale Distribution.	B. Qualifications and Skills 1. Physical Requirements
	2. Mental Ability
	3. Knowledge

Suggested Activities

Have the students simulate answers to want ads in the local newspaper.

Demonstrate completing an application for employment:
- a. Following directions
- b. Typewritten or legible handwriting
- c. Completing all items with simple and truthful answers
- d. Verifying references
- e. Dating and signing

Each student should then complete an employment application.

Discuss the essentials of an interview:
- a. Proper dress and grooming
- b. Proper greeting
- c. Proper behavior during interview
- d. Review of skills and knowledge needed for selected jobs
- e. Review of personal attributes needed
- f. Attitude and enthusiasm
- g. Closing remarks

After the students simulate an interview, have them analyze each other's performances. Have each student write a followup note of thanks based upon an interview conducted at the company whose want ad supposedly was answered.

B. Review the physical requirements necessary for employment
- a. In the distribution center
- b. In the office
- c. When using specific equipment

Discuss abilities needed in relation to:
- a. Making accurate computations
- b. Writing mailable correspondence
- c. Sorting
- d. Inventing
- e. Operating motorized equipment
- f. Making decisions

Solving a variety of case problems would give the students an opportunity to develop these abilities.

WHOLESALE DISTRIBUTION MODULE

II. CAREERS

Performance Objectives	Content
The student will be able to:	
. List 3 personal qualities that employers find desirable.	4. Personality and Character
	5. Human Relations Abilities
. Describe 3 factors that make a person promotable.	6. Experience
. Identify 5 courses that would be most beneficial to a person for promotions within the wholesaling and distribution fields.	7. Education

II. CAREERS

Suggested Activities

Have students list their own traits and qualities that would contribute to success on the job.

Completion of "How Do You Rate in Human Relations" will help the students in determining their behavior traits. (See Appendix)

After discussing the ability to get along with co-workers, superiors and the public, have students role-play or solve case problems that involve these relationships. Test the students on various competencies relating to human relations by using a sample competency-based DECA competitive event. (See Appendix)

Review the characteristics and abilities which make a person promotable.

Have students check course offerings at 2- and 4- year colleges which would prepare an individual for Wholesale Distribution management positions.

WHOLESALE DISTRIBUTION MODULE

III WHOLESALE BUYING

Performance Objectives	Content
The student will be able to:	
. Name 3 sources of supply	A. Buyer's Resources 1. Manufacturer's: a. Salesmen b. Catalogs c. Price lists 2. Trade: a. Shows b. Services c. Publications
. Identify 5 factors to consider in selecting a supplier.	B. Factors to Consider in Selecting a Supplier 1. Credit Rating 2. Reputation 3. Prices, Discounts 4. Return Policy 5. Packaging 6. Advertising 7. Proximity to Supply 8. Saleable Product 9. Quantities Needed 10. Seasonal Demand
. Describe 5 ways a wholesaler determines whether to add a product.	C. Feasibility of Adding a Product

WHOLESALE DISTRIBUTION MODULE

III. WHOLESALE BUYING

Suggested Activities

A. Request a speaker from a wholesaler, the local SME organization, or local chapters of either The National Association of Purchasing Management, Inc., 11 Park Place, New York 10007, or Purchasing Management of NY (NYC and surrounding area), 200 Park Avenue, S., New York 10003.

B. Ask the speaker mentioned above or have another person who represents any one of these organizations discuss these factors.

Select a line of goods to use as an example and relate each of these factors to its distribution.

C. Illustrative case problem:
The management of the New York Office Supply Company which wholesales paper and office supplies wishes to increase its product line. Consideration is being given to the addition of a line of pocket calculators ranging from $7.95 to $59.95 retail. The manufacturer is Japanese and well-known for its larger and more complex office machines. Should the New York Office Supply Co. add the calculators to its line?

Consider the following factors:
. Will the product fit easily into the wholesale line carried?
. Does the sales force have the time and ability to sell a new product?
. Can the product be sold to the regular customers?
. Will the product be too competitive with their other products?
. Does the product fit the company's image?
. Is there an introductory price from the manufacturer?
. Is the product legally acceptable, patented, etc.?
. Can the manufacturer provide a sufficient supply?

III. WHOLESALE BUYING

Performance Objectives	Content
The student will be able to:	
. Describe 3 food standards used to measure quality. . Describe 3 standards used to measure quality in clothing and textiles. . List 3 standards used to grade furs.	D. Standards - Measurements of Quality 1. Food a. Identity (define) b. Quality (color, tenderness) c. Fill of container (amount) d. Grades (A, B, C, Fancy, Choice, Standard) 2. Clothing and Textiles a. Names of fibers b. Percentage of weight of the fibers c. Identification of source d. Country where processed 3. Furs a. Animal b. Country of origin c. New or used d. Part of body taken from e. Bleached f. Dyed
. Complete a purchase order, including the necessary items for a valid order.	E. The Parts of the Purchase Order 1. Name and Address of Buyer 2. Name and Address of Seller 3. Purchase Order Number 4. Purchase Order Date 5. Name and Address Where Delivery Is To Be Made 6. Delivery Date 7. Shipping Instructions 8. Quantity 9. Description of Items 10. Unit price of Items 11. Extension Amount 12. Total Cost of Order 13. Terms of Sale 14. Signature Title of Person Authorizing The Purchase
. Explain 5 terms and/or symbols that are unique with the wholesaling business.	F. Terminology Most Often Used 1. Per diem 5. TOFC 9. BO 2. Demurrage 6. SOFC 10. COD 3. LCL 7. B/L 11. FOB 4. COFC 8. PO

III. WHOLESALE BUYING

Suggested Activities

D. Review some regulations of the Federal Food and Drug Administration, Trade Commission, or other governmental agencies regarding standards. Have students bring in ads, from newspapers and magazines, that illustrate standards of quality.

Assign student teams to interview persons employed in food, clothing and textiles, or furs and discuss the prevailing standards. Have them report to the class on their interviews.

E. Using a model purchase order, discuss each item and the importance of accuracy and effects of errors in its completion. Secure purchase orders from local firms, get permission to reproduce them, and have the students fill them out for practice.

F. Related mathematics problems may be found in business mathematic textbooks and workbooks.

IV. RECEIVING AND MATERIALS HANDLING

Performance Objectives	Content
The student will be able to:	
. Develop an organizational chart depicting the flow of goods from the receiving area until they are stored.	A. Receiving Procedure 1. Unloading Incoming Merchandise 2. Checking a. Direct b. Blind c. Spot or random d. Quality 3. Approving Receipt of Shipment 4. Channelling to Proper Storage Area 5. Receiving Report 6. Reporting Damaged Goods
. Describe 3 duties of the receiving clerk.	B. Duties of the Receiving Clerk 1. Traffic Management 2. Keep Stock at Desired Levels 3. Assign Merchandise Codes to Goods Received 4. Trace Overdue Shipments 5. Tag Goods Received
. Name 10 kinds of materials handling equipment.	C. Methods of Handling Materials

IV. RECEIVING AND MATERIALS HANDLING

Suggested Activities

A. Plan an organizational chart depicting the movement of goods from the time it is received until it is stored.

Compare methods of checking and determine reasons for each in regard to certain types of goods. Examples: imported stemware, men's shirts, tires, hosiery, fish hooks, ceramic spoon holders (not prepackaged), plastic waste baskets, and canned corn.

B. Arrange for selected students to "shadow" a receiving clerk and describe the experience to the class.

C. Class members may make a bulletin board montage of pictures of various types of equipment used in materials handling.

1. Wheel barrows and carts
2. Dollies
3. Tow lines
4. Tote boxes
5. Hampers
6. Fork lift - pallet goods
7. Electric tow truck
8. Tractor-trailor trains
9. Power-operated slot
10. Skate wheel conveyor
11. Overhead power conveyances
12. Conveyor system, rollers
13. Monorail
14. Automatic sortation devices
15. Electronic driverless tractors
16. Stacker cranes
17. Optical scanning equipment
18. Closed circuit television
19. Facsimile transmission
20. Data phones
21. Process control computers

IV. RECEIVING AND MATERIALS HANDLING

Performance Objectives	Content
The student will be able to:	
. Chart the flow of goods from receiving to shipping.	D. Relationship of Materials Handling to Different Divisions of Business 1. Sales 2. Purchasing 3. Accounting 4. Traffic and Transportation
. Describe 5 safety rules for a prudent employee.	E. Safety Factors 1. Good Housekeeping 2. Clean-up 3. Fire Protection 4. Lifting and Carrying 5. Using Tools and Equipment Properly 6. Protective Equipment 7. Common Sense 8. Reporting Hazardous Conditions 9. Reporting Injuries Promptly

Suggested Activities

D. Some students may enjoy constructing a flowchart depicting the movement of goods from receipt on the wholesaler's dock through the several handling processes to shipping to the retailer.

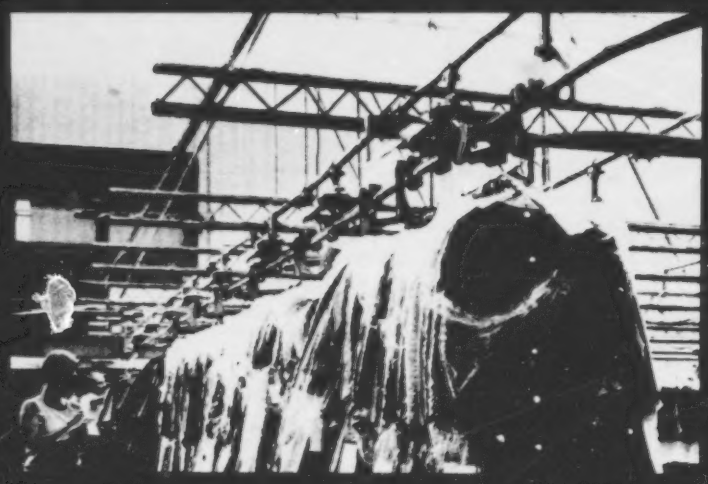
E. Have a warehouse manager explain the necessity for some of the safety rules, regulations and laws.

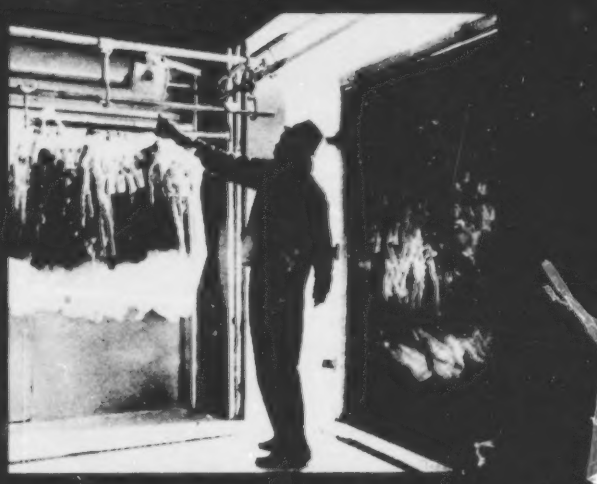
A warehouse equipment supplier might be available to discuss the selection, use, and maintenance of the various pieces of equipment.

TYPICAL FLOW PATTERN for DEPARTMENT and CHAIN STORES

(Marking Room and Distribution Center Systems)

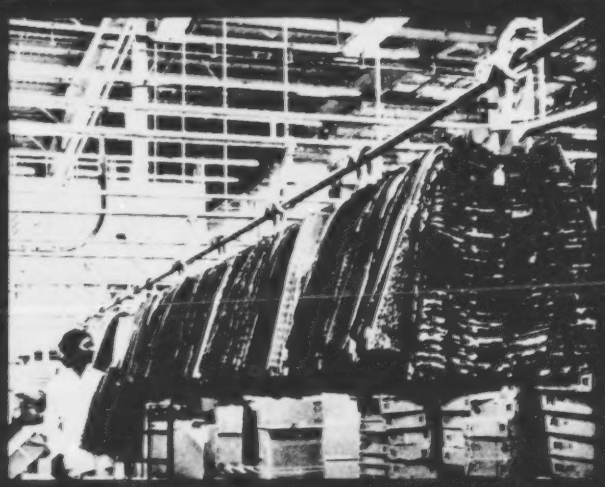
...designed to expedite the movement of fashion apparel to your sales floors and reduce processing costs





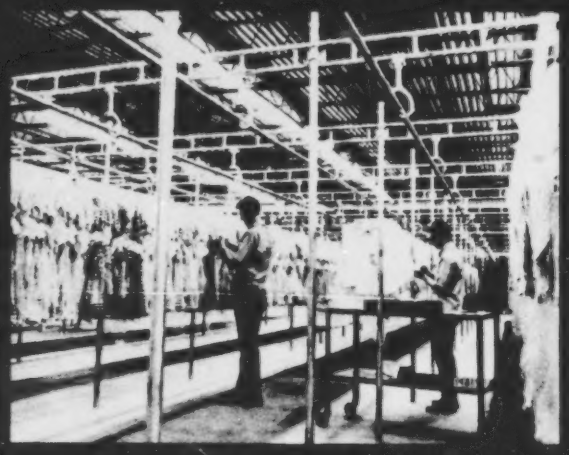
1a RECEIVING OF HANGING or CARTON MERCHANDISE

Garments on hangers are unloaded from truck and hung onto rail system for counting and receiving. Carton merchandise is received and moved to carton opening area.



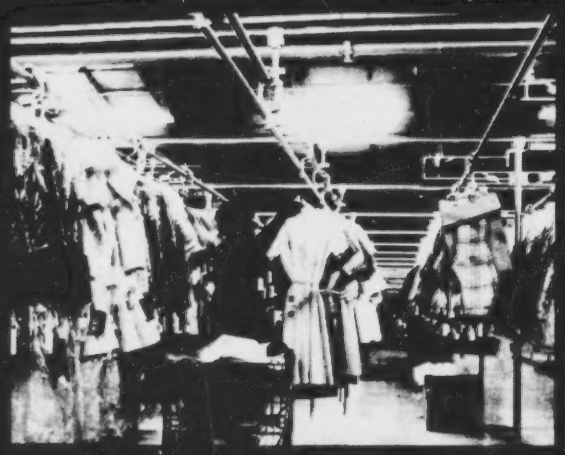
1b CARTON OPENING

At carton opening area, garments are removed from cartons, hangers are inserted or changed and garments are hung onto trolleys.



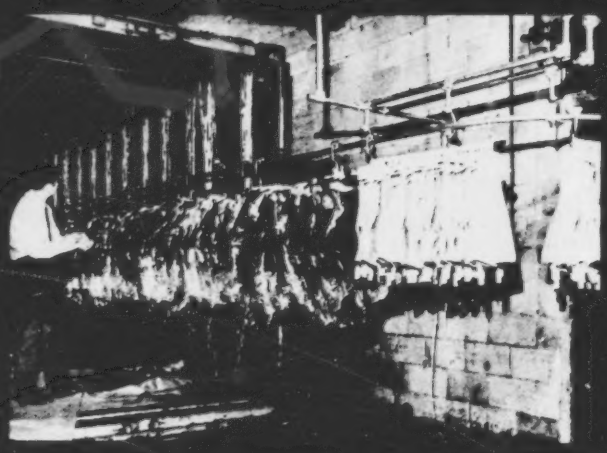
2 TICKETING

After order checking and ticket making, tickets are attached to garments.



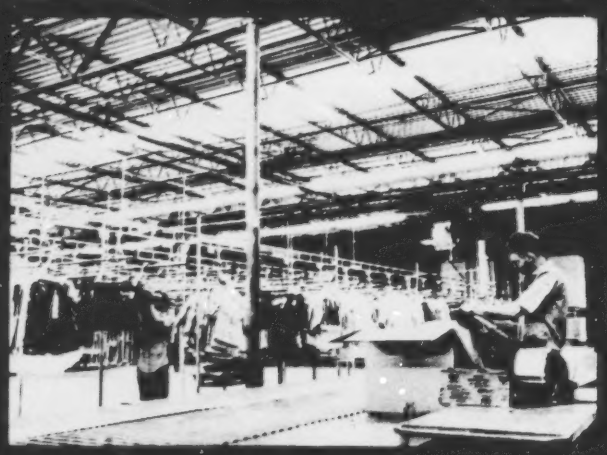
3 ALLOCATION, CONSOLIDATION and/or DISTRIBUTION

Garments are "picked" to fill departmenta orders (for department stores) or to fill individual store orders (for chains), and hung on trolleys on picker rails. Hangin merchandise then moves (1) directly to appropriate department for prompt sales display (2) to shipping area for transport to stores, or (3) to storage areas, in consolidation for later shipment.



4 SHIPPING

Depending upon the specific operational requirements, merchandise is either (1) transported via rail system directly to trucks, (2) repacked for shipment in cartons or (3) shipped hanging in closed hampers.



WHOLESALE DISTRIBUTION MODULE

V. WAREHOUSING

Performance Objectives	Content
The student will be able to:	
. Identify 2 types of warehouses.	A. Types of Warehouses 1. Public Warehouse a. General merchandise b. Special commodity 2. Private Warehouse
. Explain 2 functions of warehouses.	B. Functions 1. Distribution Centers 2. Commercial Storage
. Describe 5 factors to consider in determining the type of storage facilities needed for various goods.	C. Factors Determining Types of Storage 1. Kind of Product a. Perishability b. State . Solid . Gas . Liquid c. Size d. Weight e. Fragility f. Need for refrigeration g. Combustibility 2. Local Climate a. Temperature b. Humidity 3. Frequency of Product Movement 4. Value of Items - Need Security 5. Taxable Items 6. Federal, State, Local Regulations

V. WAREHOUSING

Suggested Activities

A. The class should visit various types of warehouses to learn how they are operated, their functions and uses.

B. Contrast job opportunities in distribution centers: those serving their own stores and those serving independent retailers.

C. Have students write short reports on selected perishable or volatile products and their related problems. Suggested items: bananas, fuel oil, tires, milk, fashion merchandise, liquor, pharmaceuticals.

Construct a scale-model warehouse, showing spaces available for storage and equipment for a particular kind of commodity (frozen foods, fashion merchandise, automobile parts). Use cardboard or balsa wood or draw the layout on graph paper.

Have students check telephone directory yellow pages or local warehouses; and through telephone interviews, request information on products carried and services offered.

V. WAREHOUSING

Performance Objectives	Content
The student will be able to:	
. Identify 5 storage methods. . Correctly label the appropriate storage method to be used for 15 different products. . Defend his (her) choice of the above storage methods.	D. Storage Methods 1. Bins 2. Bays 3. Racks a. Closed b. Open c. Drum d. Drive-in 4. Bulk Tanks 5. Elevators (grain, cement, etc.) 6. Silos 7. Freezers 8. Cold Storage 9. Live Storage
. Explain 5 purposes of inventory control. . Explain how efficient inventory control may result in increasing profits, reducing losses and expediting production. . Show how an efficient inventory control system can decrease the time needed to locate merchandise	E. Purposes of Inventory Control 1. Increases Accountability and Responsibility 2. Provides Information on Shortages 3. Reduces Stock Substitutions 4. Reduces Back Orders 5. Helps Reduce Pilferage 6. Indicates Slow Movers 7. Expedites Flow of Goods 8. Indicates Adequate Stock Levels
. Describe 3 commonly used methods of inventory control.	F. Inventory Control Methods 1. Perpetual (book) a. Stock record cards b. Bin tickets c. Stock requisitions d. Automated (EDP) 2. Physical (actual) a. Total count b. Spot check c. Partial

Suggested Activities

D. Discuss why the various storage methods are used. Students who are employed on farms, in service stations and stores could describe storage in those places of business.

Using the following examples, determine storage methods and reasons for their use:

- Small electrical appliances
- Jewelry ($5.00 to $10.00 range)
- Motor oil - quarts
- Auto tires
- Frozen foods
- Men's suits

E. Invite an accountant to discuss the need for inventory control, or develop questions to be used in interviewing him (her).

Have students report on newspaper and magazine articles on pilferage found in recent business and trade publications and discuss how this type of theft affects prices to the consumer.

F. Secure stock record cards, bin tickets, stock requisitions and EDP printouts to explain to students to familiarize them with inventory control systems.

Provide sample records to be completed in class.

Determine reasons for using the various physical and perpetual control methods.

VI. WHOLESALE SELLING

Performance Objectives	Content
The student will be able to:	
. Describe 5 functions of the wholesale salesperson.	A. Direct Personal Selling 1. Responsibilities of Wholesale Salespersons a. Interpret company policies b. Handle adjustments and complaints c. Make regular calls on existing customers d. Help establish new accounts e. Promote new products f. Attend trade shows g. Conduct seminars and training sessions h. Assist with point-of-purchase advertising and display i. Serve as a consultant j. Make product analyses
. Correctly identify 5 types of wholesale salespersons and explain their selling methods.	2. Types of Wholesale Salespersons a. Missionary salesperson b. Pioneer salesperson c. Agents and brokers d. Drop shipper e. Merchant middleperson f. Rack jobbers g. Commission merchants h. Manufacturers' representatives
. Produce a list of prospects for a selected product.	3. The Preapproach-Prospecting a. Advertising b. Cold canvassing c. Develop prospect cards d. Develop tickler file
. Prepare and deliver a sales demonstration as a wholesale salesperson. . Describe 2 benefits of a trade show to the potential buyer.	4. Approach a. Making appointments with prospects b. Visiting customers c. Use of trade shows d. Use of showrooms e. Use of direct mailings

VI. WHOLESALE SELLING

Suggested Activities

A. Invite a wholesale sales representative to discuss duties and responsibilities of the job.

A good student exercise is to develop a simulated list of potential customers for wholesale sales of a selected group of items.

Invite a training director or a sales manager to describe the "hows" and "whys" of sales seminars, in-service education, and "pep" sessions.

Have students develop a bulletin board display that represents the various types of wholesaling.

Prepare a "flow chart" depicting the various steps or stages of the sales process.

Visit a wholesale showroom to give insight into display and selling techniques.

WHOLESALE DISTRIBUTION MODULE

VI. WHOLESALE SELLING

Performance Objectives	Content
The student will be able to:	
. Describe 5 essential steps in a successful sale.	5. The Presentation a. Product knowledge . Product analysis form . Objection analysis form b. Company policies c. Sales demonstration . Involve the customer as soon as possible . Use the "you attitude" . Use a positive approach 6. The Close a. Avoid high pressure b. Recognize when the prospect is ready to buy c. Update prospect file d. Know when to start writing the order e. Leave a pleasant impression, whether or not the sale was made 7. Servicing Customers a. Warranties and guarantees b. Consignment sales c. Memorandum sales d. Service departments
. Explain the importance of feedback to the wholesaler.	8. Feedback a. Follow up questionnaires b. Trouble shooting c. Analysis of "those that got away" d. Updating prospect files
. Correctly complete 3 prospect cards to be used in a tickler file. . Correctly prepare an order form for a selected product.	9. Important Sales Records a. Order forms b. Want slips c. Tickler files d. Prospect cards e. Expense statements

WHOLESALE DISTRIBUTION MODULE

VI. WHOLESALE SELLING

Suggested Activities

A. Prepare a product analysis and an objection analysis sheet.

Have students visit firms and report back to class regarding company policies.

Have each student give a wholesale sales demonstration for class evaluation. Use the DECA rating sheet to evaluate. (See Appendix)

Invite a professional sales person to be the prospect in a sales demonstration and ask him (her) to criticise the demonstration.

Gather samples of guarantees and warranties for class discussion.

Invite a service representative to describe the job.

Each student should prepare a sample order form. Emphasize neatness and accuracy.

Complete a want slip form and discuss its use by the wholesaler.

VI. WHOLESALE SELLING

Performance Objectives	Content
The student will be able to:	
. Identify 3 methods of promotion used in wholesaling.	B. Indirect Wholesale Selling 1. Display a. Point-of-purchase display b. Product packaging to help display techniques 2. Promotion a. Cooperative advertising . Radio and television . Printed media; i.e., newspapers, catalogs b. Specialty advertising c. Informational flyers d. Direct mail campaign

VI. WHOLESALE SELLING

Suggested Activities

B. Construct a point-of-purchase display for a selected item in the school store.

Tape a radio advertisement for use on the school radio station.

If video tape equipment is available, develop a 30-second T.V. commercial.

Interview a retail food manager concerning cooperative advertising and how it applies to the food business.

Have students list fast-selling items and describe why they are good sellers.

WHOLESALE DISTRIBUTION MODULE

VII. ASSEMBLING AND SHIPPING

Performance Objectives	Content
The student will be able to:	
. Describe 4 duties of an order picker or packer.	A. Duties of an Order Picker 1. Locate Merchandise for Shipment 2. Pull Merchandise Assigned to Order 3. Check Order for Accuracy 4. Correctly Package for Shipment 5. Correctly Address for Shipment
. Explain the importance of stock rotation. . Describe the importance of accuracy in recordkeeping.	B. Assembly Functions 1. Housekeeping 2. Stock Rotation 3. Stock Replenishment 4. Accuracy 5. Recordkeeping
. Identify 5 steps in order filling.	C. Order Filling 1. Receive Packing List 2. Locate Merchandise 3. Pull for Order 4. Compare Against Packing List 5. Pack Assembled Order 6. Notify Inventory Control for Needed Merchandise.
. Correctly wrap a perishable or fragile item for shipment. . Identify 2 advantages of one packing method over another. . Correctly package and seal a bulky or odd-shaped item for shipment.	D. Methods of Packaging 1. Criteria for Container Selection a. Breakable b. Perishable c. Valuable d. Bulky e. Liquids 2. Outer Wrap a. Corregated cardboard boxes b. Polywrap c. Fiber board d. Metal containers e. Cartons f. Fiber and wood containers

WHOLESALE DISTRIBUTION MODULE

VII. ASSEMBLING AND SHIPPING

Suggested Activities

A. Design a location system for merchandise in the student bookstore.

Discuss computer controlled systems. Examples: Key Handling Systems, Inc., 204 S. Newman Street, Hackensack, New Jersey 07601; Pace Systems, 6845 Vineland Avenue, California 91605.

B. Arrange for a student to "shadow" an order picker. Student should then report to the class.

Prepare a job description for an order picker.

C. Obtain a packing list and identify the various types of data recorded.

Have students select 5 different items and an acceptable packaging method for each.

Visit a shipping department of a factory or large store to see the several methods of preparing goods for shipment.

Consult with a shipping clerk in order to purchase the latest and most efficient wrapping materials for your students to practice correct packaging and wrapping techniques.

WHOLESALE DISTRIBUTION MODULE

VII. ASSEMBLING AND SHIPPING

Performance Objectives	Content
The student will be able to:	
. Select the proper inner packing material to protect a given product for shipment.	3. Inner Wrap a. Plastic materials b. Excelsior c. Corrigation d. Shredded paper 4. Sealing Containers a. Tape reinforcing b. Staples c. Sticking d. Glue and adhesives
. Name 5 methods of transporting goods. . Compare methods of transportation for various kinds of shipments to determine advantages of one over another.	E. Methods of Transportation 1. Motor Carriers 2. Rail Carriers 3. Motor and Rail Freight Equipment and Services 4. U. S. Mail Services 5. United Parcel Service 6. Water Carriers 7. Air Freight 8. Piggyback 9. Fishyback
. Correctly define 5 terms used in shipping costs.	F. Shipping Costs 1. Freight Tariffs 2. Class Rates 3. Commodity Rates 4. Free on Board (FOB) 5. Cash on Delivery (COD) 6. Demurage 7. Per Diem
. Complete a bill of lading for a list of goods to be shipped.	G. Shipping Forms 1. Bills of Lading a. Straight b. Order c. Ocean d. Uniform e. Grain f. Government 2. Freight Bills

VII. ASSEMBLING AND SHIPPING

Suggested Activities

Prepare a bulletin board display of the various materials used to protect the product during shipment.

Wrap and seal 2 boxes. Use proper inner protection in one box and not in the other box. Simulate movement of shipment; then check the condition of the contents.

Prepare a bulletin board display showing the various types of sealing materials.

E. Bring in a traffic manager to talk to the class.

Get rate books from various carriers and let the students familiarize themselves with them.

Continue the notebook with pictures of various carriers. Determine advantages and disadvantages of various methods for selected types of goods. Compare types and size of shipments, delivery time, costs, etc.

What are some of the most important products carried by each type? Why?

F. Secure a rate book and interpret charges.

Take the class to a large warehouse or transportation center to observe a dispatcher in operation.

Discuss legal liability with an attorney.

G. Obtain samples of all types of shipping forms for students to review. Note types of information needed on various bills of lading.

Have students complete several sample forms.

WHOLESALE DISTRIBUTION MODULE

VII. ASSEMBLING AND SHIPPING

Performance Objectives	Content
The student will be able to:	
. Prepare a route on a bill of lading and determine charges for a specific shipment.	H. Routing 1. Route Selection 2. Alternate Routing for Emergencies 3. Delivery Charges
. Identify federal and state regulations affecting the transportation of goods.	I. Federal and State Regulations 1. Uniform Freight Classification 2. National Motor Freight Classification 3. Interstate Commerce Commission 4. Intra-State Regulations 5. Civil Aeronautics

WHOLESALE DISTRIBUTION MODULE

VII. ASSEMBLING AND SHIPPING

Suggested Activities

H. Using a large U. S. map, point out various shipping routes (Great Lakes, rivers, canals, railroads, airlines, trucking). Using selected products, determine routes to be used from producer or manufacturers to certain areas of the country.

I. Invite a carrier representative to discuss regulations in the transportation industry.

VIII. FINANCE AND CREDIT

Performance Objectives	Content
The student will be able to:	
. Explain the necessity for keeping financial records. . Distinguish between income and expenses in the wholesale operation. . Classify 5 items according to assets, liabilities and net worth. . From a list of 10 items, differentiate among assets, liabilities, net worth, income and expense accounts.	A. Financial Statements 1. Income Statement a. Income items b. Expense items 2. Balance Sheet a. Assets b. Liabilities c. Owner's equity
Describe the difference between perpetual and physical inventory. . Give 3 reasons for inventory control.	B. Inventory Records 1. Perpetual Inventory (book) 2. Physical Inventory
. Accurately complete a negotiable check. . Reconcile a bank statement.	C. Checking Accounts 1. Check Record 2. Bank Statement 3. Bank Reconciliation Statement
. Identify the cash receipts and cash disbursements from a list of 5 transactions.	D. Cash Receipts/Cash Disbursements 1. Purpose for Records a. Control of monies received and disbursed b. Balance on hand 2. Ledger Accounts (T accounts)

VIII. FINANCE AND CREDIT

Suggested Activities

A. Give each student a completed Income Statement. Then using an overhead projector, examine the statement to describe income and expense items and the purposes of the statement.

Same as above for Balance Sheet, and discuss relationship of assets, liabilities, and owner's equity.

Depending upon the interests and abilities of the students and the time available, they could complete one of the practice sets available commercially or conduct a simulation.

B. Have the students complete an inventory form from data given, differentiating physical and/or perpetual inventory.

Invite a receiving clerk or an inventory clerk to discuss his/her job.

C. Write check stubs and checks on blank checks or on sheets of paper cut to size.

Correctly reconcile a real or imaginary check account.

D. If you have a DECA Ch. ter, several members in your class may apply the recordkeeping principles learned in this module to construction of a chapter activities scrapbook.

VIII. FINANCE AND CREDIT

Performance Objectives	Content
The student will be able to:	
. Identify 3 types of credit plans available.	E. Credit 1. Open Account 2. Revolving/Billing 3. Consignment Sales 4. Memorandum Sales 5. Kinds of Discounts a. Cash discount b. Trade discount c. Quantity discount 6. Discount Dating a. End of month (EOM) b. Beginning of month (BOM) c. Post-dating d. Anti-dating e. Anticipation dating 7. Credit Risk Criteria a. The applicant's credit rating or history b. The applicant's present job status and income c. The applicant's employment history d. The applicant's status in the community
. Describe one procedure to use in attempting to collect a delinquent account.	8. Credit Collections a. Agencies b. Policies c. Procedures
. Describe 3 uses of electronic data processing in wholesale distribution.	F. Use of Electronic Data Processing in Recordkeeping 1. For Posting and Billing 2. For Inventory Control 3. For Merchandise Location and Retrieval 4. For Personnel Records 5. For Shipping and Receiving

Suggested Activities

E. Discuss the advantages of consignment sales versus memorandum sales.

Give the class several problems to solve relating to cash, trade and functional discounts.

Invite several credit managers to conduct a panel discussion before the class.

Analyze selected customer information to determine if approval should be granted.

Have students prepare a series of credit collection letters similar to those sent to delinquent accounts.

F. Have the students visit a computer center of a large warehouse or wholesaler and prepare a written report.

RESOURCES

TEXTBOOKS

Beaumont, John A., et al. *Your career in marketing.* 2d ed. Gregg Division, McGraw-Hill Book Company. 1976.

Bikkie, James A. *Careers in marketing.* Gregg Division, McGraw-Hill Book Company. 1971.

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Ertel, Kenneth A. *Wholesaling.* Gregg Division, McGraw-Hill Book Company. 1970.

Farris, M.T. *Economics of transportation.* American Society of Traffic and Transportation, Inc. 1971.

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Howard, Marshall C. *Legal aspects of marketing*. Gregg Division, McGraw-Hill Book Company. 1964.

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Kushner, John A. & Keily, Helen J. *How to find and apply for a job*. 3d ed. South-Western Publishing Company. 1975.

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Marland, Sidney P., Jr. *Career education*. Gregg Division, McGraw-Hill Book Company. 1974.

Mason, Ralph E., et al. *Marketing and distribution*. Gregg Division, McGraw-Hill Book Company. 1974.

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Richert, Henry G., et al. *Retailing principles & practices*. 6th ed. Gregg Community College Division, McGraw-Hill Book Company. 1974.

Rinaldi, Lawrence J. *Containerization: the new method of intermodal transport*. Sterling Publishing Company., Inc. 1972.

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PAMPHLETS

Guide to preparing a resume. New York State Department of Labor.

How to get and hold the right job. New York State Department of Labor.

How to prepare yourself for job interviews. New York State Department of Labor.

How to sell yourself to an employer. New York State Department of Labor.

Management training programs exclusively for wholesaler-distributors. The National Association of Wholesale-Distributors.

Shipping and receiving clerk. Occupational Outlook Handbook. U. S. Bureau of Labor Statistics.

The new world of public warehousing. American Warehouseman's Association. Free.

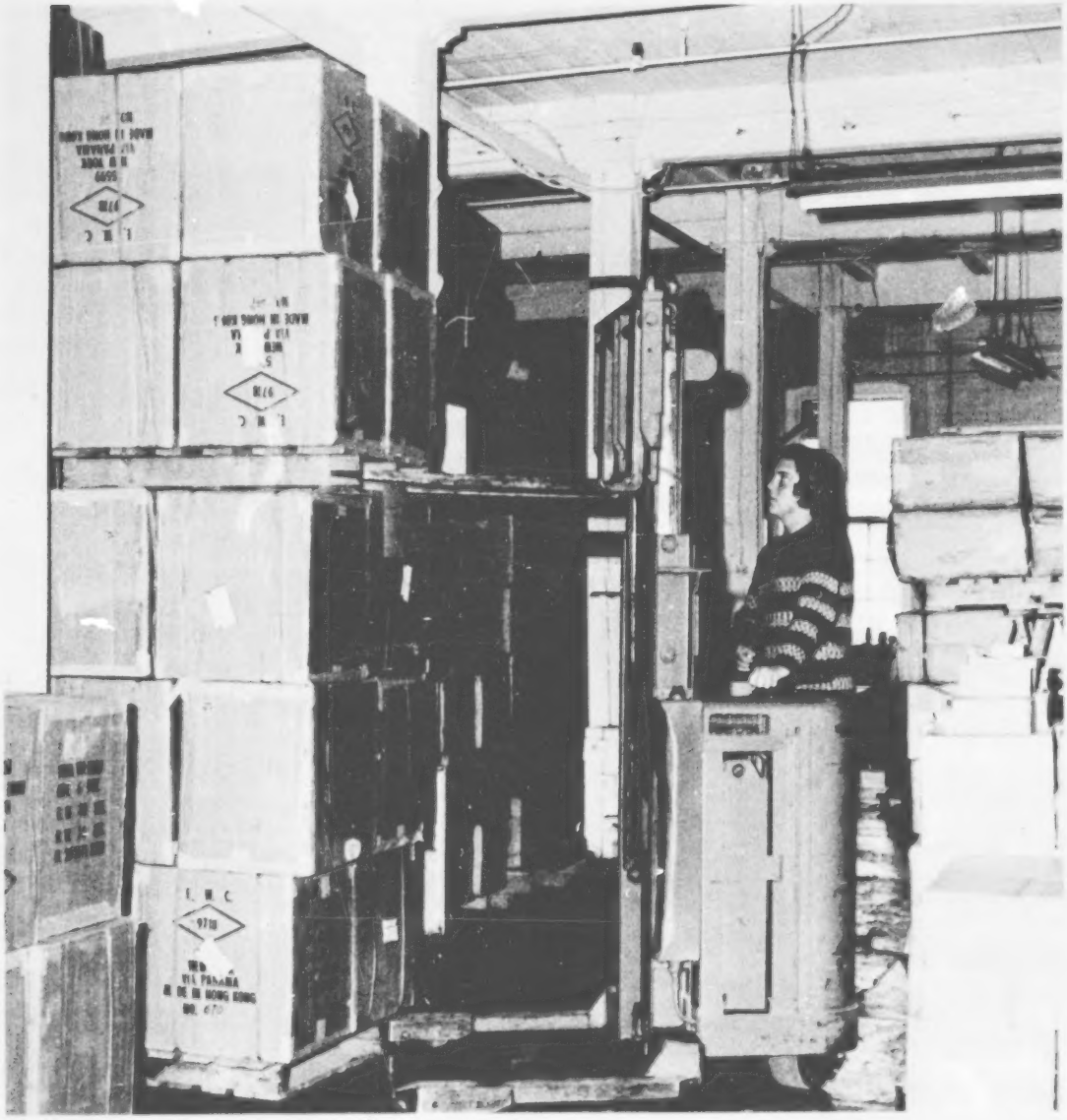
Traffic topics. National Retail Merchants Association.

Transportation: a vital link in distribution. D.E. Materials Lab. 1972 $2.00.

Wholesaling: challenge and opportunity. The National Association of Wholesale-Distributors. 5¢.

Why young people fail to get and hold jobs. New York State Department of Labor.

Your career in wholesale distribution. The National Association of Wholesale-Distributors. 30¢.



Forklifts have become standard equipment in wholesale distribution

ADDRESSES OF PUBLISHERS

TEXTBOOKS

American Society of Traffic and Transportation, Inc., 547 West Jackson Boulevard, Chicago, IL 60606.

Dryden Press Division of Holt, Rinehart and Winston, Inc., 901 No. Elm, Hinsdale, IL 60521.

Fairchild Publications, Inc., 7 East 12 Street, New York City 10003.

Gordon and Breach Science Publishers, Inc., 440 Park Avenue South, New York City 10016.

Gregg/Community College Division of McGraw-Hill Book Company, Hightstown, New Jersey 08520.

Harcourt, Brace, Jovanovich, Inc., 757 Third Avenue, New York City 10017.

MacMillan Publishing Company, Inc., 866 Third Avenue, New York City 10022.

National Retail Merchants Association, 100 West 31 Street, New York City 10001.

Prentice-Hall, Inc., Englewood Cliffs, New Jersey 07632.

Random House/Singer School Division, 201 E.50th St., New York City 10022.

Richard D. Irwin, Inc., 1818 Ridge Road, Homewood, IL 60430.

Ronald Press, 79 Madison Avenue, New York City 10016.

South-Western Publishing Company, Inc., 925 Spring Road, Pelham Manor, New York 10803.

Sterling Publishing Company, Inc., 419 Park Avenue South, New York City 10016.

PAMPHLETS

American Warehouseman's Association, 222 West Adams Street, Chicago, IL. Free.

D.E. Materials Lab, 1885 Neil Avenue, 115 Townshend Hall, Columbus, OH 43210.

Delta Nu Alpha Transportation Fraternity, 15017 Detroit Avenue, Cleveland, OH 44107.

The National Association of Wholesale-Distributors, 1725 K Street, N.W., Washington, D.C. 20006.

National Food Brokers Association, 1916 M Street N.W., Washington, D.C. 20036.

National Retail Merchants Association, 100 West 31 Street, New York City 10001.

New York Life Insurance Company, 51 Madison Avenue, New York City 10016.

New York State Department of Labor, Office of Public Information, Building 12, State Campus, Albany, New York 12201.

Small Business Administration, U.S. Government Printing Office, Washington, D.C. 20402.

United States Bureau of Commerce, Washington, D.C. 20233.

United States Bureau of Labor Statistics, 1515 Broadway, New York City 10036.

United States Department of Agriculture, Washington, D.C. 20250.

United States Department of Labor, Washington, D.C. 20210.

APPENDIX

A. SAMPLE OF COMPETENCY-BASED DECA COMPETITIVE EVENTS
A CASE PROBLEM IN HUMAN RELATIONS IN WHOLESALING

COMPETENCIES TO BE TESTED

Knowledge of how to develop and maintain a pleasant working environment.

Skill in developing and maintaining harmonious relationships with other employees.

Skill in working cooperatively with fellow employees, supervisors, and management, and being aware of their needs and motivations.

An awareness that good human relations improve employee morale by encouraging cooperation, generating happiness, and creating harmony.

OBJECTIVES

When given a case problem dealing with Wholesaling, the student will demonstrate the ability to develop a good human relations climate in a wholesale food distributorship.

BRIEF DESCRIPTION OF EVENT

The participant will be given ten (10) minutes to read and study a case problem dealing with human relations. The participant will then join a team which will consist of himself and two (2) other participants. Each individual participant should take no more than two (2) minutes to present the problem and his/her solution to the other members of the team. Once all team members have presented the problem and their individual solution, the team will have no more than ten (10) minutes to discuss the problem and come to a group decision. Total time after study should not exceed twenty minutes.

Each participant will be evaluated by one judge or a panel of judges. The participant will be evaluated on the basis of his/her individual presentation and on performance in the team discussion. The team will not be evaluated on its decision; rather, each individual participant will be evaluated on his/her contribution and human relations ability.

STUDENT INSTRUCTION SHEET

You will be given a case problem dealing with the Wholesaling industry. You are to demonstrate your ability in developing a good human relations climate in a wholesale food distributorship.

Procedure

1. You will be given ten (10) minutes to read the case problem and develop your thoughts. You may make notes on the back of this paper.

2. You will then join one, two or three other participants to form a team. You and each member of your team will have a maximum of two (2) minutes to state the problem or problems, present your solution to your team mates, and justify your solution. Your presentation is to be made to the team members, not the judges. Assume you know the other member(s) of the team, but not very well.

3. After all individual presentations are made, you and your team member(s) are to discuss the problem and come to a group decision. Ten (10) minutes will be allowed for this section of the activity. The total time for the presentations and discussion is twenty minutes. Judge your time accordingly.

4. You may not talk to the judges. The judges will not enter into the discussion.

5. Judging will be based on your presentation and your participation in the team discussion. Your team will not be judged as a group.

CASE PROBLEM

You are one of three (3) Distributive Education students employed with a local wholesale food distributorship.

Mr. Taylor, the manager, is a personable man who is respected and well liked. The employees take great pride in the center and work as a team under Mr. Taylor's leadership.

The center is having problems with inventory. For more than a year, the business has failed to make a profit.

The home office has decided to transfer Mr. Taylor to another center. Your new manager has a reputation for solving inventory problems. He also has a reputation for being tough, impersonal, and strict. Your first impression is that you don't like him.

There is growing discontent among the employees. Some are threatening to quit and go to work with another company, while others are talking about slowing down on their work in order to make the manager look bad to the home office.

You and two (2) other Distributive Education students who work there have decided to go to lunch together and discuss the situation.

JUDGES INSTRUCTIONS

Objective:

When given a case problem dealing with the wholesaling industry, each student will demonstrate his/her ability to develop a good human relations climate in a wholesale food distributorship.

The participants that you judge will be in groups of two to four. Each individual participant will have no more than two (2) minutes to present the case problem, his/her solution, and justification for the solution. The presentation will be given to the members of the group -- not to you.

After each participant has presented the case, the team will have no more than ten (10) minutes to discuss the problem, and come to a group decision.

You are to rate each individual participant on the rating sheet. Do not rate the team as a whole.

Occupational Category: WHOLESALING

Instructional Area: Human Relations

JUDGES RATING SHEET

Your rating sheet is in two (2) parts: the individual presentation and the team discussion. There is also a section for judges discretionary points.

There are nine (9) rated items on the rating sheet consisting of questions dealing with human relations competencies. Enter the number of points the student is awarded for each question in the block at the end of the line.

Discretionary points are to be awarded in cases where the student does an outstanding job and you feel that extra points should be given.

Please be sure to rate each category, circle the number of points awarded and enter that number in the box.

INSTRUCTIONS: Group No._____

Enter the number of points each student is awarded for each question in the block at the end of the line. Judges' discretionary points are to be awarded in cases where the student does an outstanding job and you feel that extra points should be awarded.

INDIVIDUAL PRESENTATION

When making the individual presentation did the student:	Participant Number/ID		
	# ____ ID	# ____ ID	# ____ ID
1. Show concern about developing and maintaining a pleasant working environment?			
Fair Good Excellent	1	2	3
0123 4567 8910			
2. Seem aware that good human relations depend on the personality?			
Fair Good Excellent	1	2	3
0123 4567 8910			

3. Seem aware that good human relations improve employee morale? Fair Good Excellent 0123 4567 8910	1	2	3
Total Individual Presentation (Possible 30 points)			
TEAM DISCUSSION:			
In the Team Discussion, did the participant: 1. Develop and maintain harmonious relationships with other team members? Fair Good Excellent 0123 4567 8910	1	2	3
2. Work cooperatively with other team members? Fair Good Excellent 0123 4567 8910	1	2	3
3. Interact willingly with the other team members? Fair Good Excellent 0123 4567 8910	1	2	3
4. Seem aware of the personalities of the other team members and adjust to their personalities? Fair Good Excellent 0123 4567 8910	1	2	3
5. Did the participant encourage cooperation, generate happiness and create harmony in the group? Fair Good Excellent 0123 4567 9810	1	2	3

6. Did the participant show evidence of an ability to recognize, organize, and solve the human relations problem?					
Fair	Good	Excellent	1	2	3
0123	4567	8910			

7. Judges' discretionary points			
	1	2	3
012345			
TOTAL POINTS (POSSIBLE 100)			

APPENDIX

B. A CAREER MANUAL FOR TRANSPORATION (04.19) OR WHOLESALING (04.22)

Objective or Purpose

To determine the competencies, skills, and educational requirements necessary, and opportunities available for a specific career in transportation or the wholesale trade. To give experience in research, selection, and organization of information for practical use on a career in transportation or the wholesale trade.

To give the student the background necessary for an intelligent evaluation of a particular career objective in relation to his/her personal goals.

Pre-Project Preparation

The student will have completed at least the orientation unit of Wholesale Distribution and have some familiarity with the related marketing clusters.

Step-By-Step Description

Each student will:

1. Compile a list of the various occupations he/she would consider as a career objective.

2. Interview at least two persons who perform the various occupations listed.

3. Prepare an outline for the career manual.
   Topics to be included:

   Educational background required
   Personality and aptitudes needed
   Competencies and skills necessary
   Employment statistics and trends
   Opportunities for advancement
   On-the-job training
   Job description
   Pay scales and fringe benefits

4. Write the manual.

5. Include a bibliography showing textbooks, library references, trade journals, and other resources used in developing the manual.

6. Minimum length, 15 typed pages, double-spaced. Illustrations and other materials may be added.

Evaluation

The instructor will evaluate the manual as to its appearance (originality, appropriateness of illustrations, neatness and layout), use of words (grammar and spelling) and subject coverage. The information should be clear, concise, complete and usable. Background information should include current and projected employment statistics; past, present and future qualifications; personality and education required; opportunities for advancement and on-the-job training; job descriptions; and pay scales with prevailing fringe benefits.

APPENDIX

C. HOW DO YOU RATE IN HUMAN RELATIONS?

Directions: Attempt to rate yourself objectively in terms of the following behavior traits which are associated with effective human relations. Evaluate yourself as excellent, good, fair, or poor for each item and determine your overall score by using this point system: (Indicate the letter of the rating, E, for example, and the points for each item.)

E - Excellent - 3 points
G - Good - 2 points
F - Fair - 1 point
P - Poor - 0 points

Rating: Points	(E,G,F,P) Letter		Behavior Traits Associated with Effective Human Relations:
_____	_____	1.	I am adaptable to and with new people and situations.
_____	_____	2.	I recognize people as individuals who differ in their attitudes, abilities, backgrounds, problems, reactions to various situations, and moods.
_____	_____	3.	I exhibit enthusiasm in my associations with others.
_____	_____	4.	I look for something to like in others, even when an individual has negative personality traits.
_____	_____	5.	I ask appropriate questions when I am uncertain what is expected of me.
_____	_____	6.	I act appreciative and express thanks for thoughtful or helpful deeds on my behalf.
_____	_____	7.	I am industrious and happy when I have meaningful work to do.
_____	_____	8.	I demonstrate initiative by thinking and acting without being urged and by working beyond what is required.
_____	_____	9.	I possess integrity: I do not tell falsehoods. I do not steal money, time, supplies, or ideas.
_____	_____	10.	I am tactful: I say and do the right thing when dealing with others. I try never to give offense to others.

*HOW DO YOU RATE IN HUMAN RELATIONS? - continued

Rating: Points	(E,G,F,P) Letter		Behavior Traits Associated with Effective Human Relations:
_____	_____	11.	I notice the accomplishments of others and praise them for their successes.
_____	_____	12.	I maintain my sense of humor even when the "going gets rough."
_____	_____	13.	I cooperate with others: I work harmoniously in group activities. I do my share of the work and am willing to help others.
_____	_____	14.	I am loyal: I feel strongly the ties that bind me to people, places, and ideals. I keep confidences and do not betray the trust of my associates.
_____	_____	15.	I am dependable: I do routine things without being told. I am on hand when I am needed. I complete assignments on time and keep appointments on time. I can be counted on to do what I say I will do and what is expected of me.
_____	_____	16.	I show consideration for others: In making decisions, I am mindful of the effect my future conduct will have on others. I am well mannered and courteous.
_____	_____	17.	I display patience through my tolerant understanding of the needs, problems, and shortcomings of my associates.
_____	_____	18.	I show sincere interest in the ideas, suggestions, goals, and points of view of those with whom I come in contact.
_____	_____	19.	I accept responsibility for my own actions and avoid "passing the buck."
_____	_____	20.	I control my negative emotions in contacts with others: I try to handle frustrations in a positive manner. I avoid showing feelings of anger, jealousy, hate, and worry. I am working toward being an emotionally mature person.

*Human Relations in Marketing, 1971, Distributive Education Service, State Department of Education, Richmond, Virginia 23216.

SALES REPRESENTATIVE

RATING SHEET

	Possible Points	Poor	Fair	Good	Excellent	Judged Points
1. OPENING: Consider personal introduction, opening statement, confidence.	10	0-2	3-5	6-8	9-10	_____
2. PRESENTATION: Consider benefits shown, presentation clear, too rapid or too slow, vocabulary and grammar.	20	1-5	6-10	11-15	16-20	_____
3. VISUAL AIDS: Consider handling of product or facimile by both buyer and salesman, logical order of presentation of other audio-visual aids.	10	0-2	3-5	6-8	9-10	_____
4. ORGANIZATION OF PRESENTATION: Consider neatness and organization of material, order of presentation.	15	2-4	6-8	10-12	13-15	_____
5. CLOSE: Consider summary and conclusion of presentation, opening for callback.	10	0-2	3-5	6-8	9-10	_____
6. VOICE: Consider pitch, tempo volume, enthusiasm, enunciation and pronunciation.	5	0-1	2-3	4	5	_____
7. APPEARANCE, POISE, AND CONFIDENCE.	10	0-2	3-5	6-8	9-10	_____
8. REACTION UNDER PRESSURE: Consider time, handling objections, answering questions, etc.	15	2-4	6-8	10-12	13-15	_____
9. Judge's weighted, subjective evaluation of total presentation.	5	0-1	2-3	4	5	_____
					TOTAL JUDGED POINTS	_____

Judge's Comments: